

## End-of-the-Year Clean-Up Tasks

As this school year draws to a close there are a few Destiny maintenance tasks to be addressed. Review the information and take care of these tasks if they have not already been completed.

- **Stop Scheduled Reports/Notices**

Go to Reports > Patron > Circulation > Current Checkouts/Fines. Review each of the "Saved Report/Notices" listed. Delete any old reports from the list. Report/Notices that have a hyperlink to a date/time indicate a scheduled report that runs automatically. If the report does not need to be run over the summer, (e.g., overdue notices), click on the hyperlink and set the report to "Do not schedule." In the fall, you can reset the schedule so that the reports will run automatically again.

- **Delete Un-needed Jobs from the Job Manager**

Reports run before April 1, 2012 will be deleted during summer. However, you should review any reports run after this date and delete those that are not needed (e.g., overdue notices that are no longer current, In-Progress inventory reports after the inventory has been finalized).

- **Correct Any Incorrect Call Number Prefixes**

Review the collection stats summary report (Reports > Library > Statistics > Collection Statistics - Summary) to identify any "stray" call number prefixes that may be in your collection, and correct these as necessary. Also, consider whether any call number prefixes can be consolidated so your patrons will have an easier time locating materials. (For example, consider merging VT and DVD if these are intershelved.) It is not recommended to have a call number prefix for every format of item in your media center. Call number prefixes identify the location where materials are housed. The fewer locations/places patrons have to look for items the better.

- **Remove Titles Without Copies**

Review your Library Statistics report (Reports > Library > Statistics > Library Statistics) to identify the number of Titles without Copies. Remove these titles by clicking on Catalog > Update Titles > Remove Titles. After you have "previewed" your list, use the "Remove" button to delete these title records.


- **Remove or Correct Copies Without Call Numbers**

Review this report (Reports > Library > Catalog--Titles & Copies > Call Number Reports > Copies Without Call Numbers) and remove or correct items without a call number. All items in Destiny need to have a call number associated with it in order for reporting and inventory to be accurate and in order that items be located successfully by patrons.


- **Review & Correct Copies With Different Call Numbers**


This report (Reports > Library > Catalog--Titles & Copies > Call Number Reports > Copies with Different Call Numbers) identifies the instances in your collection in which copies of the same item have been assigned different call numbers. This report will help identify and correct any copies that are unintentionally shelved in different locations, copies in which the Destiny call number does not match the spine label, and items that are attached to a title record of the incorrect material type. (A video and a book with the same title should *never* be attached to the same title record.)


- **Verify that All Items Added Have the Required Information**

School board auditors require that certain copy information be included and correct for all items. Review the report "  Items Added in 2011 - 2012" (Reports > Report Builder) and verify that each item listed has the Funding Source, the Vendor, price, and a 14-digit, Code 3 of 9 barcode (all 14 digits listed). Use this report and update your copies as needed. Any item added to Destiny since 2006 - 2007 should include all of this copy information.

□ **Review & Correct Funding Sources**

The funding sources for items in your catalog should be designated using only the standardized list of terms for our district. Run the funding source summary (Reports > Report Builder >  Funding Source Summary List) to see a list of the funding source terminology that is currently in use in your catalog. Compare this report to the list of Standard Terms for Funding Sources to see if there are any non-standard funding sources listed.

If any non-standard funding sources are in use, you will need to globally update these to replace the non-standard items with the correct term on the standardized list. Use this report along with the "  Funding Source = xxx" report to accomplish this task.

Duplicate the "  Funding Source = xxx" report, replace the xxx with one of the incorrect funding sources identified in your "Funding Source Summary List" report, and modify the report to look for this funding source. (Example: If the funding source "Gift" was used instead of the correct standardized term "Donation," create a "Funding Source = Gift" report to list all the items with this funding source. Use Catalog > Update Copies > Global Update to change funding source from "Gift" to "Donation." Repeat this process for each incorrect funding source in use.

□ **Delete Items Marked Lost from Previous Inventory**


Run the "View Lost" list (Back Office > Inventory). This list can be sorted on screen in order and reverse order by date. Review the list carefully and delete copies marked lost on or before 8/1/2010 (or items lost prior to your last inventory).

□ **Delete "Old" Graduates** *(for each grade level reports)*

Run a list of students who graduated from your school last year or before. Use Reports, Patron, Patron Lists, Patron Names" and select "Graduation Year" is "Before the Year" indicated below. These represent "old" patrons in Destiny. These will need to be manually deleted by the media specialist:

- **2012** for High Schools
- **2015** for Middle Schools
- **2019** for Elementary Schools

□ **Review & Remove Patron Notes**

Notes are added to patron records for a variety of reasons throughout the school year. It is always recommended that your name and a date be entered at the end of the note so these can be "cleaned-up" as needed. Run the Report Builder report  "Patrons with Notes". This report will list all patrons with a note and the note contents. Notes should be deleted if it does not list who placed it or does not have a date referenced. All notes should be deleted once they are no longer applicable.

□ **Collect Materials and Delete all Non-Cobb Patrons**

Run Overdue Notices for any non-Cobb patrons (volunteers, student teachers, parents, substitutes, etc.) who have items out. Either deliver the notice in person or contact them by phone to ensure that all library media materials are returned before the school year ends. Library media specialists may also wish to report materials not returned by these patrons to the school administration. After collecting all materials (or marking them lost, if necessary) from these patrons, delete any who are no longer active. Review all other non-Cobb patrons to ensure that their accounts have a patron expiration date and that the date is set to July 1, 2013.

□ **Clean up Fines/Lost Books**

Run the Current Checkouts/Fines Report (Reports > Patron > Circulation > Current Checkouts/Fines). Review and clean up these fines as necessary:

- If a student has transferred or graduated, delete any *overdue* fines. See "Fines for Transferred Patrons" for additional information.
- If a patron has not been at your school for more than a year, mark any items owed as lost.
- If a patron has not been active in any Cobb school for more than a year, delete their patron record according to the instructions for "Inactive Patrons," above.
- Consider waiving/deleting any fines of \$5 or less.

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